

Caseload Management Customer Report (CMCR)

From UWORKS:

1. Select Customer Miscellaneous from CM Magnifying Glass Speed Button
2. CM Status: Active
3. Counselor: Enter CTW Specialist, Select Both from drop down box
4. Select Search at the top, right hand side of the screen

UWORKS {Production} - Case Management Search

File Edit Navigation Options Utility Window Help

Case Management Search

General Additional

CM Status: Active Enrollment Type: ☐ Veterans Only

Counselor: Faye A. Edebiri Both ☐ No Notes last 30 days

Team: Referral Service: ☐ No Tasks last 30 days

Office: Date: - ☐ All History

Region:

County:

SSN	Name	Primary Counselor Office Team Title	City	Phone
<input checked="" type="checkbox"/>	PEDRO	Faye A. Edebiri Central Regional Office Central Regional Office	SALT LAKE CITY	
<input checked="" type="checkbox"/>	ATRICK M	Faye A. Edebiri Central Regional Office Central Regional Office	SALT LAKE CITY	
<input checked="" type="checkbox"/>	U, CINDY	Faye A. Edebiri Central Regional Office Central Regional Office	S SALT LAKE	
<input checked="" type="checkbox"/>	JOSEPH T	Faye A. Edebiri Central Regional Office Central Regional Office	SALT LAKE CITY	
<input checked="" type="checkbox"/>	FERLY I	Faye A. Edebiri Central Regional Office Central Regional Office	SALT LAKE CITY	
<input checked="" type="checkbox"/>	DAN	Faye A. Edebiri Central Regional Office Central Regional Office	SALT LAKE CITY	
<input checked="" type="checkbox"/>	RANDEE K	Faye A. Edebiri Central Regional Office Central Regional Office	SALT LAKE CITY	
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Total Records: 7 Number Selected: 7

Destination: Seeker Info Tab

Click in box to select a specific case

Record: 1/7 ... <OSC>

Review all cases on CMCR Report to find the following:

- 1) Last Note within 30 days
- 2) Next Appointment Date or Next Contact Date
- 3) External Counselor Listed
- 4) Searchable is marked Yes
- 5) Service is blank (Employment Plan)
- 6) Service on Employment Plan
- 7) Employment Plan Date and Hours
- 8) Enrollment/Possible Enrollment

ACTIONS

Review all cases on CMCR Report to find the following:

- 1) Last Note within 30 days
 - a. 30+ need to contact client and narrate
- 2) Next Appointment or Contact
 - a. If none set, contact and set appointment or task and narrate
- 3) External Counselor Listed
 - a. If none listed, add External Counselor on Counselor Information Screen
- 4) Searchable is marked Yes
 - a. If marked No, is client appropriate for CTW? Mark Y on Placement Screen
- 5) Service is blank (Employment Plan)
 - a. No Service, set appointment to create plan and narrate
- 6) Service on Employment Plan
 - a. CTW Primary
 - b. CTW Expanded
 - c. Follow Up CTW - open minimum of 90 days, maximum 12 months
 - i. 90+ days still employed, can close Follow Up Service: **“Completed”** for successful closure and **add to your Monthly #’s Placement List**
 - ii. Under 90 days, quit/terminated, etc. close Follow Up Service: **“Did Not Complete”** and **open new CTW Primary or Expanded Service**
- 7) Employment Plan Date and Hours
 - a. 6+ months - Staff case and narrate – Consider other options:
 - i. OJT, Internship,
 - ii. Refer back to VR or DWS Counselors if client needs a job coach, further training, or is not ready or willing to work
 - b. If client lost or quit job before 90 days, close Follow Up Service: **“Did Not Complete”** and re-open CTW Primary or Expanded Service
 - c. General guide for participation hours on plan:
 - i. if working full time enter 40 hrs/wk
 - ii. if job searching part time enter 10-15 hrs/wk
 - iii. if job searching full time enter 25-35 hrs/wk
- 8) Enrollment/Possible Enrollment
 - a. If working with DWS Counselor, staff with them to update plan with appropriate CTW Services (CTW Primary, CTW Expanded, Follow Up CTW)
 - b. DWS Counselor is the primary Counselor on the case, CTW is the Secondary
 - c. Staff with DWS for special participation requirements